

Money Wise UK

Growing Together With Integrity And Respect



GROWING TOGETHER
WITH INTEGRITY AND
RESPECT



www.quantqualuk.co.uk

www.money-wise.uk

Growing Together With Integrity And Respect

Why Partner with Money Wise UK™?

Running a successful financial planning practice comes with complex challenges. Whether it's staying ahead of regulatory requirements, managing client expectations, or planning for the future, the right guidance can make all the difference.

Consider these key questions:

- Are you concerned about growing regulatory pressures?
- Consumer Duty, vulnerability assessments, anti-greenwashing compliance—how confident are you that your processes meet these ever-evolving requirements?
- Are you looking for guidance on the latest thematic reviews? Careful planning is required to ensure that there are no conflicts of interest, maintain consistency across your practice, and align solutions with your clients' needs.
- How do you articulate the value of your services without focusing on costs? Demonstrating your unique value proposition is key to standing out in a competitive market.
- Are you preparing for a successful retirement or business sale? Transitioning out of your business with confidence demands robust preparation and strategy.

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Introducing Money Wise UK™

Founded by George Ladds in 2024, Money Wise UK isn't just another consultancy. It's a trusted partner for financial planning practices, offering tailored advice and solutions.

What sets us apart?

We listen first.

Instead of second-guessing your needs, we take the time to understand your business, identify pressure points, and offer solutions only if they add value.

Real-world experience.

Having run a specialist financial planning practice and successfully sold it, we know firsthand the challenges and opportunities of your industry.

Ethical and supportive partnerships.

Our approach is guided by the golden rule: treat others as you wish to be treated. This philosophy drives us to create partnerships rooted in mutual trust, growth, and success.

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A Synergy with QuantQual

Money Wise UK operates as an independent consultancy under the QuantQual umbrella, giving clients access to unparalleled expertise:

QuantQual: Investment research tailored for financial advisers.

Money Wise UK: Bespoke content and consultancy services.

Choose one or both to meet your specific needs. Together, we provide a comprehensive solution for growing your business while navigating regulatory and market complexities.

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Expertise at Your Service

Our Experience:

George Ladds has a proven track record of building and running financial planning businesses, with hands-on expertise in:

- Portfolio management (active and index strategies).
- Navigating direct authorisation and working with compliance consultants.
- Developing and managing website content, fund updates, and client newsletters.
- Overseeing operational aspects such as PI insurance, accounts, and governance.

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Expertise at Your Service

Our Approach:

Every consultancy project is client-centric. Since our inception, we've provided tailored solutions for businesses ranging from startups to established firms.

Our work includes:

- Creating and optimising website content with SEO in mind.
- Designing Webador websites and managing LinkedIn profiles.
- Establishing compliance systems, including consumer duty and vulnerability checks.
- Developing marketing plans and anti-greenwashing statements.
- Producing engaging blogs, newsletters, and insightful podcasts.

Our Clients:

We've partnered with five financial planning practices, addressing unique challenges across business stages. Whether it's building a value proposition or tackling operational pressures, we deliver effective solutions.

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Our Bespoke Services

At Money Wise UK, we don't offer off-the-shelf solutions. Instead, we tailor our services to your needs, ensuring value at every step.

Compliance:

- Setting up processes and compliance diaries.
- Monthly Consumer Duty and vulnerability reviews.
- Implementing centralised retirement propositions and anti-greenwashing policies.

Marketing:

- Designing Webador websites and updating content on other platforms.
- Ensuring SEO best practices.
- Creating regular content like blogs, newsletters, and LinkedIn posts.

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Our Bespoke Services

Investments:

- Reviewing and refining investment propositions.
- Conducting fund manager interviews and adhering to product governance requirements.

Client Communication:

- Producing engaging blogs, newsletters, and podcasts to build stronger client relationships.

Operations:

- Streamlining marketing plans and partnerships.
- Enhancing business efficiencies and scalability.

What People Say About George Ladds and Money Wise UK

You actually wouldn't believe how grateful I am for all you are doing; I think it is the business version of life-changing.

George has terrific insight into Investor behaviour and is always focussed on achieving mutually successful outcomes for clients and the business. A pleasure to work with.

Your dedication and the skills you've demonstrated in your work speak volumes. I'm confident that this change, although challenging, will open new doors for you where you can thrive and continue to make a significant impact.

George is a very personable, hardworking individual who has an excellent understanding of the financial services industry. Whilst at Fair Investment Company he has successfully led a number of complicated projects from start to finish and identified and secured a number of key new business opportunities.

George is well organised and has a systematic approach to his work. His dedication and proactive work ethic has made him a valued member of our team.

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Next Steps

If you feel overwhelmed by your business's demands or want to explore growth opportunities, let's have a conversation.

A call costs nothing, and we'll provide honest feedback. If we can help, we will. If not, we'll guide you to other solutions.

Contact Money Wise UK™ today and discover how we can help your practice thrive.